

North Carolina COVID-19 Vaccine Management System (CVMS)

Provider Portal

Recipient Bulk Upload User Guide

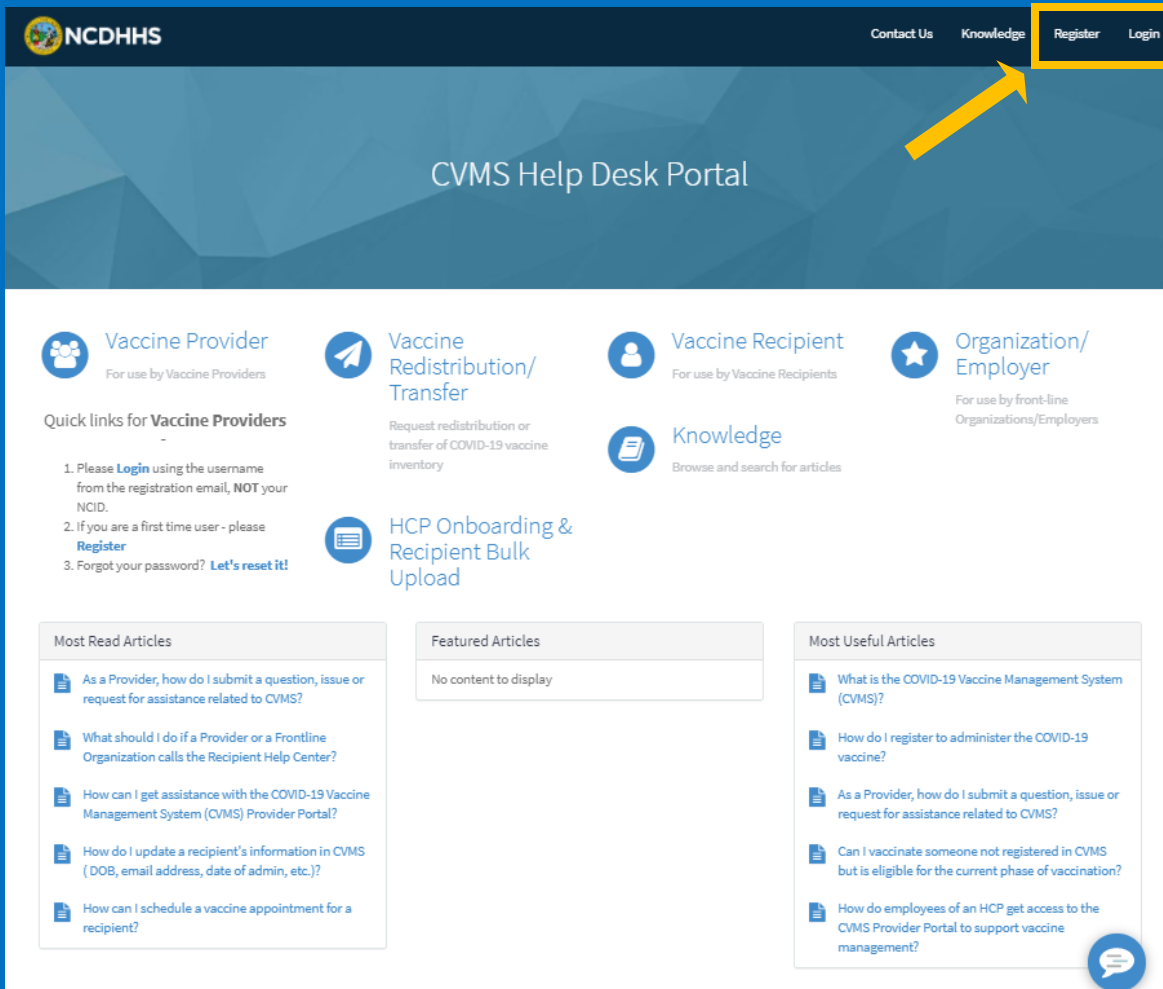
Version 8

June 11, 2021



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the CVMS Help Desk Portal* at

https://ncgov.servicenowservices.com/csm_vaccine

You can also call the COVID-19 Vaccine Provider Help Center at **(877) 873-6247** and select option 1.

The COVID-19 Vaccine Provider Help Center is available during the following hours:

Monday to Friday: 7 am – 7 pm ET

Saturday & Sunday: 10 am – 6 pm ET

* On the home page of the CVMS Help Desk Portal, select Login at the top right-hand corner, then select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, and business e-mail
3. You will receive an e-mail with your username and temporary password to log into the portal

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Recipient Bulk Upload Process Overview

Overview

The screenshot shows the NCDHHS CVMS Provider Portal. The top navigation bar includes links for Home, Recipient, Appointments, Bulk Registration, Vaccine Inventory, Shipments, and More. The main content area is divided into three sections: Recipient Check-In, Today's Appointments, and Appointment Walk-In. The Recipient Check-In section has a form for entering an appointment confirmation number and a 'Go' button. The Today's Appointments section displays a table with columns for Time, Details, Case Number, and Location. The Appointment Walk-In section has a form for searching by name and date of birth.

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1
Mar 09, 21, 09:58 AM	Grace Mid Wilms Dose 1 Scheduled	03045751	Clinic Location1

As a Healthcare organization, you can upload recipients' information into the CVMS Provider Portal for them to register in the COVID-19 Vaccine Portal. When completing a Recipient Bulk Upload, you will typically focus on 4 core areas:

1. Completing the Recipient Bulk Upload Template
2. Uploading the Recipient Bulk Upload file to the CVMS Provider Portal
3. Correcting File Errors & Re-uploading
4. Viewing uploaded Recipient records

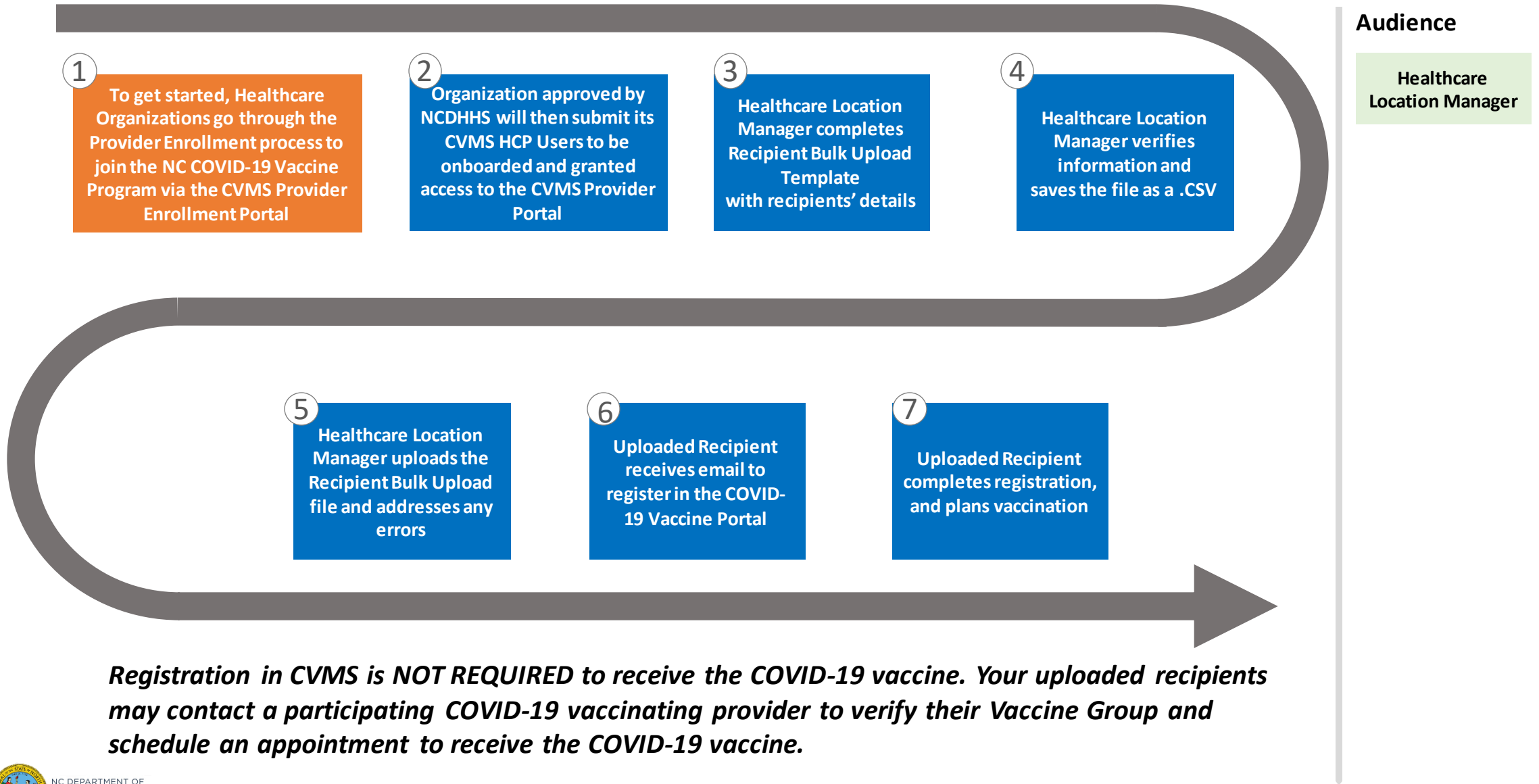
The Recipient Bulk Upload Process is carried out by the **Healthcare Location Manager** profile.

And lastly, you will need to:

- Use the latest version of Chrome, Edge Chromium, Firefox, or Safari browsers (Internet Explorer and Edge non-Chromium browsers are not supported)
- Log in the CVMS Provider Portal using your NCID username and password at <https://covid-vaccine-provider-portal.ncdhhs.gov>

Now, let's get started!

Recipient Bulk Registration Process Overview



Terminology



CSV File

A type of file saved through Microsoft Excel. To save as CSV file, **select “Save As” → under File Type select “.csv (comma-delimited)”**



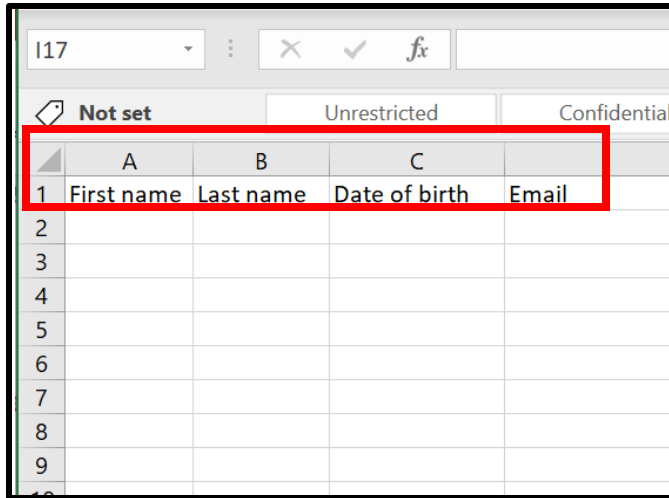
**Healthcare
Organization**

Hospital, medical facility, retail pharmacy, nursing home, etc. that will be dispensing the COVID-19 vaccine

Complete the Recipient Bulk Upload File

Step 1 of 2: Add Employee or Individual Recipient Data to Recipient Bulk Upload Template

To begin the Recipient Bulk Upload process, you will need to collect information on your recipients. Ensure that legal names and real email addresses are captured.



	A	B	C	
1	First name	Last name	Date of birth	Email
2				
3				
4				
5				
6				
7				
8				
9				
10				

1. Download the **RECIPIENT BULK UPLOAD TEMPLATE** file from the NC Immunization Branch Training page for COVID-19 vaccine providers: <https://immunize.nc.gov/providers/covid-19training.htm>
2. Enter the following information in the template:
 - First Name
 - Last Name
 - Date of Birth (in MM/DD/YYYY format)
 - Email Address

Note:

- You may load files with a maximum of 100 Recipient records using the Low Volume tab.
- You may load files with a maximum of 5,000 Recipient records at a time using the High Volume tab.
- Special characters will not be accepted and will result in failure to create the Recipient's record

DO NOT create any files with more than 5,000 Recipient records.

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Tips

If your Recipients do not have a valid email address or do not want to register, they should schedule an appointment with an enrolled COVID-19 vaccinating provider.

They can go to <https://covid19.ncdhhs.gov/findyourspot> to see a list of vaccinating providers.

Step 2 of 2: Verify & Save Data to Upload File

You are now ready to **REVIEW ALL REQUIRED EMPLOYEE/RECIPIENT DATA** that you have entered and **SAVE THE FILE AS A .CSV FILE**.

To change an EXCEL file to a .CSV file,

1. Click the **FILE** button
2. Click **SAVE AS**
3. **ENTER A FILE NAME** (no file name requirements)
4. For file type, select **CSV (comma-delimited) (*.csv)**
5. Click **SAVE**

File name: Employee Bulk Upload File.csv

Save as type: CSV UTF-8 (Comma delimited) (*.csv)

Authors: Troche, Azalea

Tags: Add a tag

Title: Add a title

Save

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Upload a Low Volume File (100 or fewer recipients at a time)

Step 1 of 4: Select the Low Volume tab for 100 or fewer records

If you have 100 or fewer records to upload, start by selecting the **LOW VOLUME TAB**. We recommend using this method as it will be faster. If you have several hundred employees, you can create multiple files of 100 or fewer records to upload individually.

- 1. At the top of your Homepage, navigate to the **BULK REGISTRATION TAB**
- 2. Select the **LOW VOLUME** tab

Audience

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Home

Recipient

Appointments

Bulk Registration

Vaccine Inventory

Shipments

More

Low Volume (100)

High Volume (5,000)

Recipient Upload

If you're uploading 100 employees or less, upload file here.

Drag and Drop CSV file here

Total number of records: 10561

Search this list...

First Name

Last Name

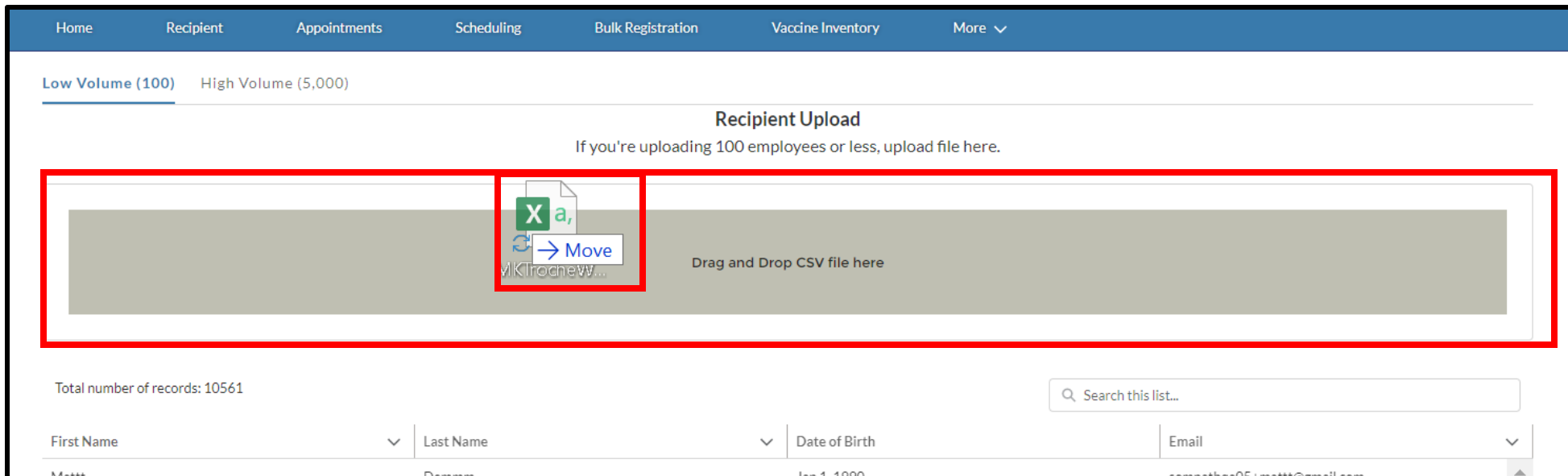
Date of Birth

Email

Step 2 of 4: Uploading the Recipient Bulk Upload File with the Low Volume Tab

When you upload your Recipient Bulk Upload File using the Low Volume tab, you will be able to review your data before creating the records.

1. Drag and drop your file to the **DRAG AND DROP CSV FILE HERE** area
2. Your data will appear directly below



The screenshot shows the 'Recipient Upload' section of a web application. The navigation bar at the top includes links for Home, Recipient, Appointments, Scheduling, Bulk Registration, Vaccine Inventory, and More. Below the navigation bar, there are two tabs: 'Low Volume (100)' and 'High Volume (5,000)'. The 'Low Volume (100)' tab is selected. The main heading is 'Recipient Upload', followed by the instruction 'If you're uploading 100 employees or less, upload file here.' Below this is a large grey rectangular area with the text 'Drag and Drop CSV file here'. A red rectangle highlights a portion of this area, showing a file icon with an 'X' and a 'Move' button. Below the drag-and-drop area, there is a search bar labeled 'Search this list...' and a table with columns for First Name, Last Name, Date of Birth, and Email. The table contains one row of data: 'Matt', 'Dennis', 'Jan 1, 1990', and 'cmatt@051matt@gmail.com'.

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Tips

Remember, you can only upload a maximum of 100 recipient records at a time using the Low Volume tab.

For instructions on using the High Volume tab, skip to the next section.

Step 3 of 4: Review Your Data in the Low Volume Tab

Once you upload your file, review your data. Please correct any errors before creating your records.

- 1. **REVIEW** the uploaded data
- 2. If you find errors or missing information, click **CANCEL**
 - *Clicking **CANCEL** removes the file*
- 3. If the data looks correct, click the **CREATE RECORDS** button

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Home

Recipient

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Scheduling

Bulk Registration

Vaccine Inventory

More

Low Volume (100)

High Volume (5,000)

Recipient Upload

If you're uploading 100 employees or less, upload file here.

MKTrocheWITHERRORS.csv (application/vnd.ms-excel)- 268bytes, last modified: 3/10/2021

FIRST NAME	LAST NAME	DATE OF BIRTH	EMAIL
Ashley1	Learn	12/1/1955	Ash1.Example@mailinator.com
Ashley2	Learn	12/2/1955	Ash2.Example@mailinator.com
Ashley3	Learn	12/3/1955	Ash3.Example@mailinator.com
Ashley4	Learn	12/4/1955	Ash4.Example@mailinator.com

Create Records

Cancel

Step 4 of 4: Review Successful and Failed Record Alert Message

After creating the records using the **LOW VOLUME TAB**, you will see an **ALERT MESSAGE** appear. The message will state the number of **SUCCESSFUL** recipient uploads and number of **FAILED** recipient uploads.

Once you click **OK**, the recipients who were successfully loaded will **RECEIVE AN AUTOMATIC EMAIL NOTIFICATION** allowing them to **REGISTER** to the **COVID-19 VACCINE PORTAL**.

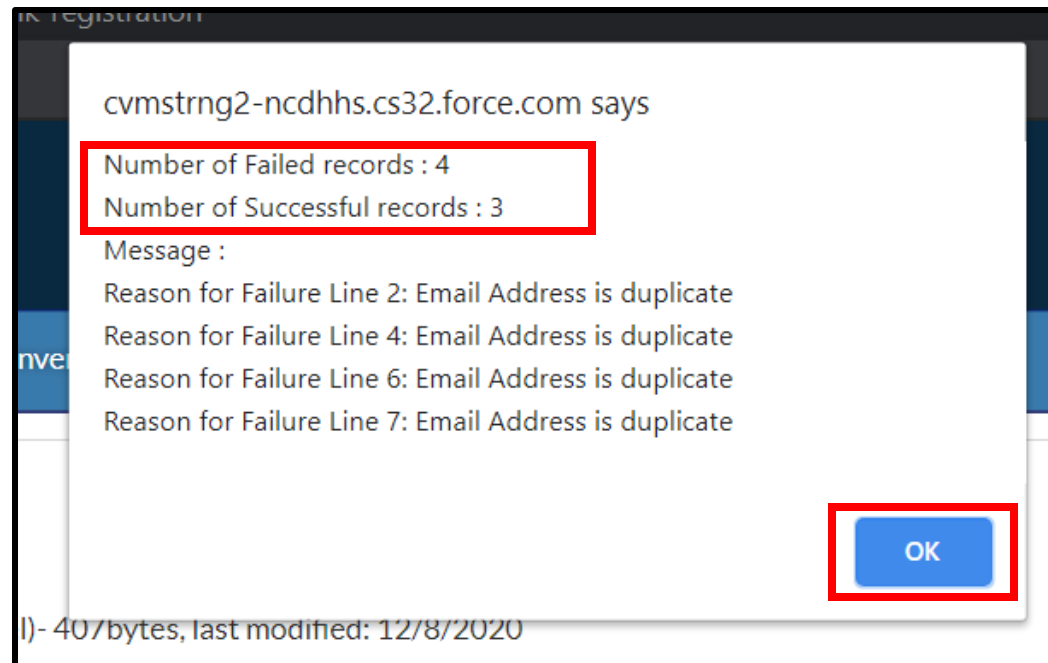
*We will cover how to manage **FAILED RECIPIENT UPLOADS** in the **VIEW AND RE-UPLOAD FILE SECTION**.*

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Tips

You can view all uploaded recipients in the CVMS Provider Portal.



Upload a High Volume File (More than 100 recipients at a time)

Step 1 of 4: Select the High Volume tab for more than 100 records

If you have a significant number of records to upload at once (over 100 records, but less than 5,000), you will need to use the High Volume process.

- 1. Click the **HIGH VOLUME TAB**
- 2. Click **UPLOAD FILE**
- 3. Select a file **FROM YOUR DESKTOP**

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Home

Recipient

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Vaccine Inventory

Shipments

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Low Volume (100)

High Volume (5,000)

Recipient Upload

If you're uploading between 101 to 5,000 employees, upload or drop file here. (This process may take up to 30 minutes to complete)

Upload or drop CSV file here

Upload Files

Or drop files

Total number of records: 10561

Search this list...

First Name

Last Name

Date of Birth

Email

Step 2 of 4: While Your High Volume Recipient Bulk Upload is Processing

Unlike the Low Volume process, the content of your file will not appear on the screen prior to completion of your file's upload.

Also worth noting, larger files will take longer to upload. While CVMS processes your upload, you will be able to leave the page and it will continue processing in the background.

If the upload process for High Volume gives an error, use the Low Volume tab instead

1. Click **DONE** once the Upload is complete

The screenshot shows the 'Recipient Upload' interface. At the top, there's a navigation bar with links: Home, Recipient, Appointments, Bulk Registration, Vaccine Inventory, Shipments, and More. Below this, there are tabs for 'Low Volume (100)' and 'High Volume (5,000)'. The 'High Volume' tab is selected. The main heading is 'Recipient Upload', followed by a note: 'If you're uploading between 101 to 5,000 employees, upload or drop file here. (This process may take up to 30 minutes to complete)'. A modal window titled 'Upload Files' is open, showing a file named 'MKTrocheWITHERRORS.csv' (167 B) with a progress bar and a green checkmark. Below the file information, it says '1 of 1 file uploaded'. A blue 'Done' button is highlighted with a red box. At the bottom of the modal, there's a search bar labeled 'Search this list...'. The background shows a table with columns: First Name, Last Name, Date of Birth, and Email. The total number of records is 10561.

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Tips

This process may take up to 30 minutes to complete.

Step 3 of 4: Successful High Volume Recipient Bulk Upload


Once your file is successfully uploaded, you will see a **SUCCESS BANNER** appear at the top of the page. You will also receive an automatic email notification.

If all your recipient records were successfully created, you will receive an email notification with the number of successfully created records.

Successfully loaded recipients will **RECEIVE AN AUTOMATIC EMAIL NOTIFICATION** allowing them to **REGISTER** in the **COVID-19 VACCINE PORTAL**.

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Success
File submitted for processing

Home

Recipient

Appointments

Bulk Registration

Vaccine Inventory

Shipments

More

Low Volume (100)

High Volume (5,000)

Recipient Upload

If you're uploading between 101 to 5,000 employees, upload or drop file here. (This process may take up to 30 minutes to complete)

Total number of records: 10561

First Name

[External] Sandbox Bulk Employee Upload - Success

NC CVMS <nccvms@dhhs.nc.gov>

To

Reply

Reply All

Forward

Wed 1/13/2021 12:33 PM

The Bulk Employee upload file has been successfully loaded with no rejected records. Details of the file loaded are below:

Filename:MKTrocheWITHErrors

Number of Records Successfully Loaded: 1000

Step 4 of 4: Failed High Volume Recipient Bulk Upload

If there were any errors in your file upload, you will receive an email notification with a summary of **SUCCESSFUL AND FAILED RECORDS**. In the next section, we will cover how to manage failed recipient uploads.

Only successfully loaded recipients will **RECEIVE AN AUTOMATIC EMAIL NOTIFICATON** allowing them to **REGISTER** in the **COVID-19 VACCINE PORTAL**.

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Bulk Employee Upload - Failure

NC

NC CVMS <nccvms@dhhs.nc.gov>

To

BulkError.csv

486 bytes

The Bulk Employee upload file has loaded with errors. Please review below for details of the file. Please review the attachment for the specific lines that failed:

Filename:MKTrocheWITHERERRORS

Number of Records In File:1

Number of Records Successfully Loaded: 999

Number of Records Failed:1

View and Re-Upload File Errors

Step 1 of 3: Receive Email with Upload File Errors

If any recipient records included in your recipient bulk upload failed to upload, you should **AUTOMATICALLY RECEIVE AN EMAIL** from the CVMS Provider Portal.

The attachment included in the email will **CONTAIN THE FAILED RECORDS** in the same recipient bulk upload format. It will also include an additional column with the **REASON FOR FAILURE**.

- 1. OPEN THE EMAIL
- 2. OPEN THE EXCEL ATTACHMENT in the email

Not set		Unrestricted		Confidential	Highly Confidential	Restricted
	A	B	C	D	G	
1	FirstName	LastName	Date of birth	Email	Error	
2	Nicholas		12/2/1955	Nicholas.NoEmail@companyemail2.com	Line 2: Required fields are missing: [LastName]	
3	Nicholas	TestLoadE2Recip3	12/3/1955	Nicholas.NoEmail@companyemail3.com	Line 3: Email: invalid email address: Duplicated Nicholas.NoEmail@companyemail3.com	
4	Nicholas			Nicholas.NoEmail@companyemail4.com	Line 4: Required fields are missing: [Date of birth]	
5	Nicholas	TestLoadE2Recip5	12/5/1955	bademail	Line 5: Email: invalid email address: bademail	
6	Nicholas	TestLoadE2Recip6	12/6/1955		Line 6: Required fields are missing: [Email]	
7	Nicholas	TestLoadE2Recip7	12/7/1955	Nicholas.NoEmail@	Line 8: Email: invalid email address: Nicholas.NoEmail@	
8	Nicholas	TestLoadE2Recip8	12/8/19555	Nicholas.NoEmail@companyemail8.com	Line 8: Date of birth: invalid Date of birth: 12/8/19555	
9						

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Tips

You will receive an email with any failed uploads, whether you use the Low Volume or High Volume tab.

Step 2 of 3: Fix File Errors

Inside the attachment is a list of recipients records that failed to load into the system.

No successfully loaded recipients will be included in this list.

- 1. In the attached Excel file, find the column **ERROR**
- 2. Use the **ERROR** field to identify the issue and **CORRECT THE DATA IN THE SAME SHEET**

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Not set		Unrestricted		Confidential	Highly Confidential	Restricted
	A	B	C	D	E	
1	FirstName	LastName	Date of birth	Email	Error	
2	Nicholas		12/2/1955	Nicholas.NoEmail@companyemail2.com	Line 2: Required fields are missing: [LastName]	
3	Nicholas	TestLoadE2Recip3	12/3/1955	Nicholas.NoEmail@companyemail3.com	Line 3: Email: invalid email address: Duplicated Nicholas.NoEmail@companyemail3.com	
4	Nicholas			Nicholas.NoEmail@companyemail4.com	Line 4: Required fields are missing: [Date of birth]	
5	Nicholas	TestLoadE2Recip5	12/5/1955	bademail	Line 5: Email: invalid email address: bademail	
6	Nicholas	TestLoadE2Recip6	12/6/1955		Line 6: Required fields are missing: [Email]	
7	Nicholas	TestLoadE2Recip7	12/7/1955	Nicholas.NoEmail@	Line 8: Email: invalid email address: Nicholas.NoEmail@	
8	Nicholas	TestLoadE2Recip8	12/8/19555	Nicholas.NoEmail@companyemail8.com	Line 8: Date of birth: invalid Date of birth: 12/8/19555	
9						

Step 3 of 3: Save and Re-Upload the Updated Recipient Bulk Upload File

Once you review and correct any recipient data errors, you are ready to **RE-UPLOAD THE UPDATED FILE**. Most of the time you will have less than 100 errors to correct, so you can re-upload your file using the Low Volume tab.

- 1. On the same sheet where you made your updates, **DELETE** the **ERROR COLUMN**
- 2. **SAVE** the file as a **.CSV**
- 3. Navigate to the **BULK REGISTRATION** tab
- 4. Upload your file using the **LOW VOLUME** or **HIGH VOLUME** tab

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Tips

Remember, the only columns that should be listed in your file are First Name, Last Name, and Email address.

HomeRecipientAppointmentsBulk RegistrationVaccine InventoryShipmentsMore

Low Volume (100)High Volume (5,000)

Recipient Upload

If you're uploading 100 employees or less, upload file here.

Drag and Drop CSV file here

Total number of records: 10561

Search this list...

First NameLast NameDate of BirthEmail

Fix File Errors – Potential Reasons for Failure

There are a few reasons why a recipient record may fail to be uploaded – from blank fields to invalid data formats.

Potential Error Messages:

1. EMAIL ADDRESS IS DUPLICATE:

- Meaning: The email address you attempted to upload was already found in the system under the same first name, last name, and Date of birth. CVMS does not require a unique email for each recipient, but the system will check the first name, last name, and DOB to see if it's a duplicate.

2. FIRST & LAST NAME CANNOT BE EMPTY:

- Meaning: A name value was not entered.

3. INVALID CHARACTERS:

- Meaning: A name field contained special characters.

4. INVALID EMAIL ADDRESS:

- Meaning: An invalid email address was submitted. CVMS looks for @ sign in email field.

5. DATE OF BIRTH CANNOT BE BLANK

- Meaning: A Date of birth value was not entered.

6. INVALID DATE OF BIRTH

- Meaning: An invalid Date of birth was submitted. CVMS only accepts mm/dd/yyyy date of birth format.

Audience

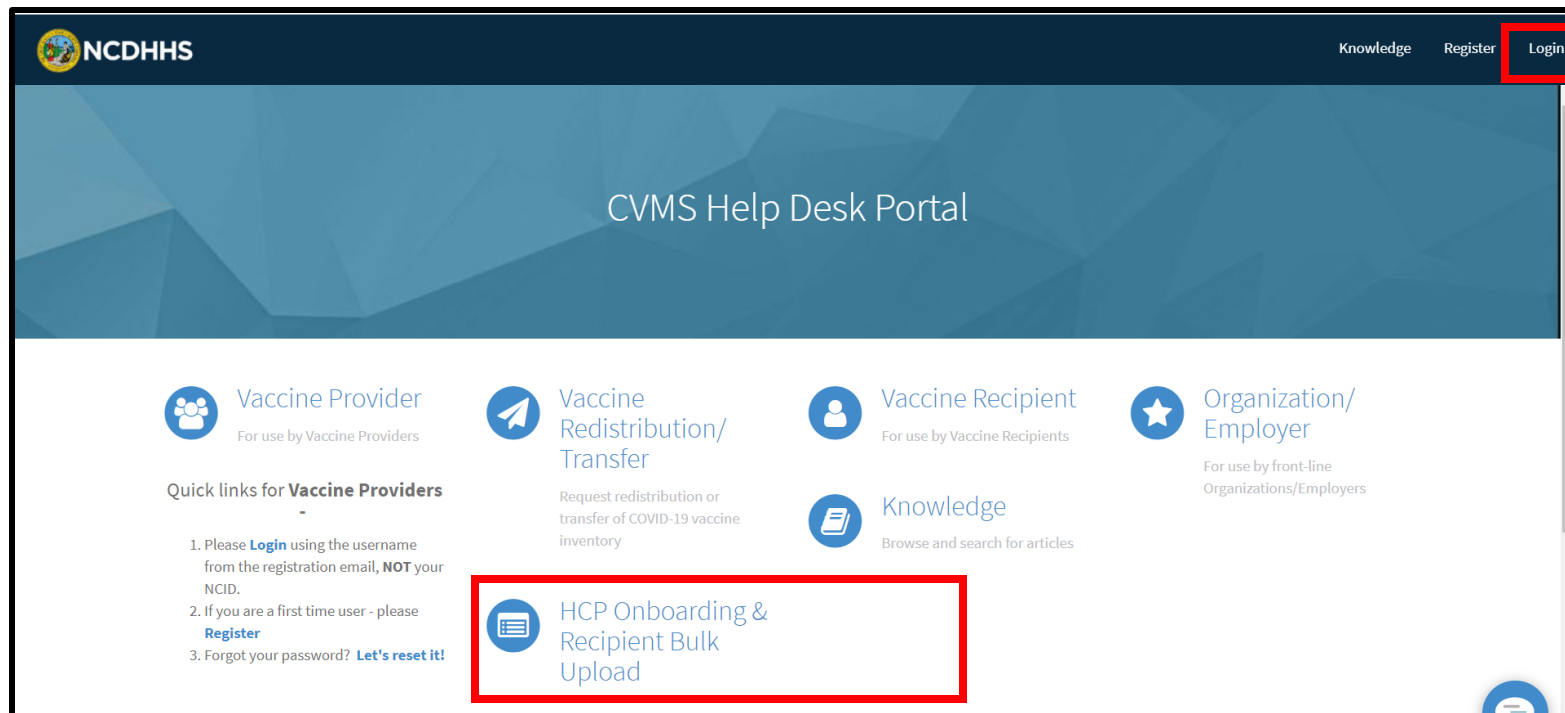
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Submit the Recipient Bulk Upload File to the CVMS Help Desk Portal

Step 1 of 3: Initiate a Recipient Bulk Upload Request

For locations needing assistance with uploading their employees to the CVMS Provider Portal, you can initiate an **HCP ONBOARDING & RECIPIENT BULK UPLOAD REQUEST**.

1. Navigate to the **CVMS HELP DESK PORTAL** at https://ncgov.servicenowservices.com/csm_vaccine
2. Click on the **LOGIN** button the portal (or register if it's your first attempt)
3. Enter your CVMS Help Desk Portal **USERNAME** and **PASSWORD**
4. From the Home page, click the **HCP ONBOARDING & RECIPIENT BULK UPLOAD** button



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Tips

Please reference slide 2 if you have CVMS Help Desk Portal registration or log in questions.

Step 2 of 3: Submit a Recipient Bulk Upload Request

1. After clicking on the request button, select **RECIPIENT BULK UPLOAD** from the request type field
2. Complete the fields
3. Attach the **RECIPIENT BULK UPLOAD FILE** to the request in the .CSV format
4. Click the **SUBMIT** button when the form is complete

Home > Healthcare Provider Onboarding and Recipient Bulk Upload

Healthcare Provider Onboarding and Recipient Bulk Upload

Healthcare Provider Onboarding and Recipient Bulk Upload

* Request Type
Recipient Bulk Upload

* VFC Pin

* Organization

* Requestor Name
Shayan Abbasi

* Requestor Email Address

Attachment Required: Recipient Bulk Upload Spreadsheet

Add attachments

Submit

Required Information
VFC Pin Organization Requestor Email Address

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Tips

The VFC PIN code is the Provider registration number (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add “NCA” to the front of the six-digit PIN#). For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021.


Step 3 of 3: Receive an email of confirmation

- 1. After submitting the file, you will receive a confirmation email with the case number
- 2. If you click on the link, you will be re-directed to a summary view of the case

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Case VACHCP0001015 opened - Recipient Bulk Upload

IT Service Desk

to me ▾

Your case has been created, click here to view the case: [Link](#)

Someone will assist you soon.

John Smith

just now

C_Portal_Intake_AssignmentGroupMappings.xlsx

19.9 KB

John Smith

just now

VACHCP0001014 Created

Start

Actions

Close Case

Ticket Fields details

Number	Priority
VACHCP0001014	3 - Moderate
State	Account
New	Unregistered Provider-CVMS
Updated	
just now	

Attachments

NC_Portal_Intake_AssignmentGroupMappings.xlsx (19.9 KB)

just now

View Uploaded Recipient Records

View Uploaded Recipient Records

You will be able to **REVIEW YOUR LOADED RECIPIENTS** who are in the CVMS Provider Portal via the **BULK REGISTRATION TAB**.

- 1. From your home page, navigate to the tab **BULK REGISTRATION**
- 2. Locate the table of **LOADED RECIPIENTS**
- 3. You can **SEARCH LOADED RECIPIENTS** by **FIRST NAME AND LAST NAME** in the list view search bar
- 4. You can also **SORT** the list of recipients by clicking on the **COLUMN NAME**

Total number of records: 10561

Search this list...

First Name	Last Name	Date of Birth	Email
Mattt	Demmm	Jan 1, 1990	somnathqa05+mattt@gmail.com
Tej19820	Par19820	Mar 8, 2000	tejporey+forte19820@gmail.com
Tej19821	Par19821	Mar 8, 2000	tejporey+forte19821@gmail.com
Tej19822	Par19822	Mar 8, 2000	tejporey+forte19822@gmail.com
Tej19823	Par19823	Mar 8, 2000	tejporey+forte19823@gmail.com
Tej19824	Par19824	Mar 8, 2000	tejporey+forte19824@gmail.com
Tej19825	Par19825	Mar 8, 2000	tejporey+forte19825@gmail.com

Audience

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Tips

All loaded recipients will also be searchable from the Recipient tab in the CVMS Provider Portal.

How to Remove Loaded Recipients

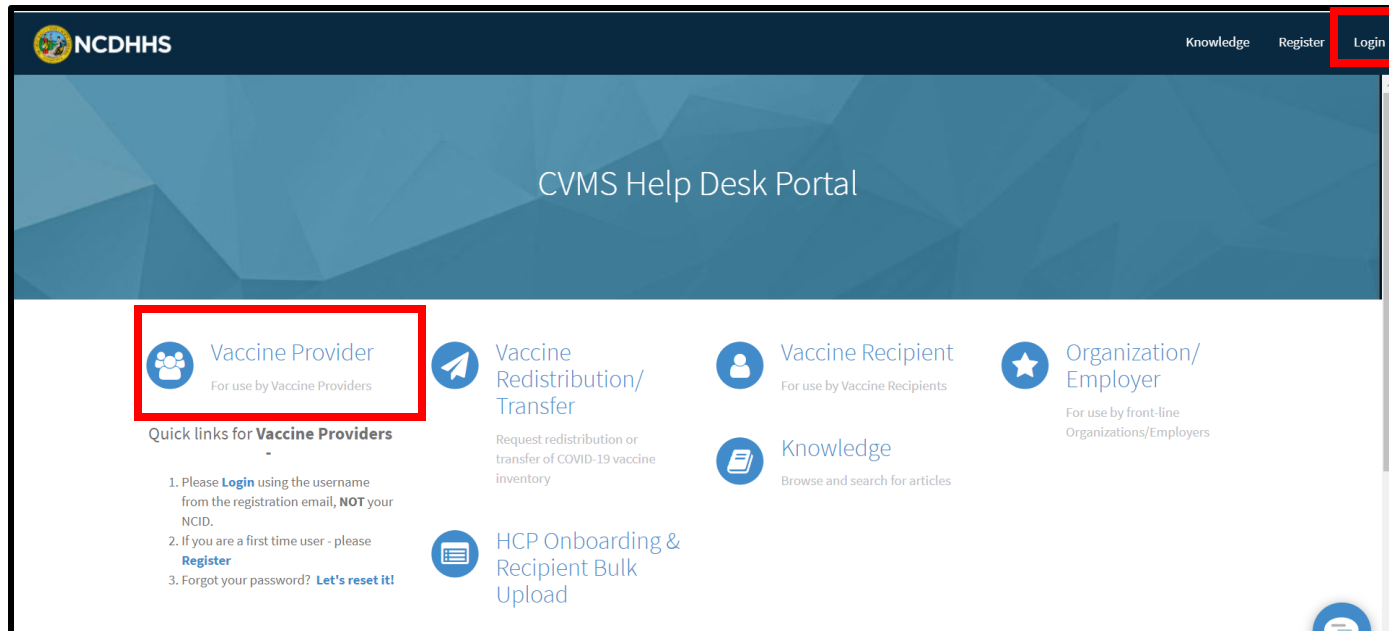
Remember, all successfully loaded recipients will automatically be sent an email with their COVID-19 Vaccine Portal username and a link to access the COVID-19 Vaccine Portal to complete their account set-up and registration.

You **CANNOT DELETE YOUR LOADED RECIPIENTS**. If you need to remove an uploaded recipient,

1. Navigate to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine
2. Log in the system
3. Click on **VACCINE PROVIDER**
4. Fill the Intake form and submit a request to remove the recipient from CVMS.

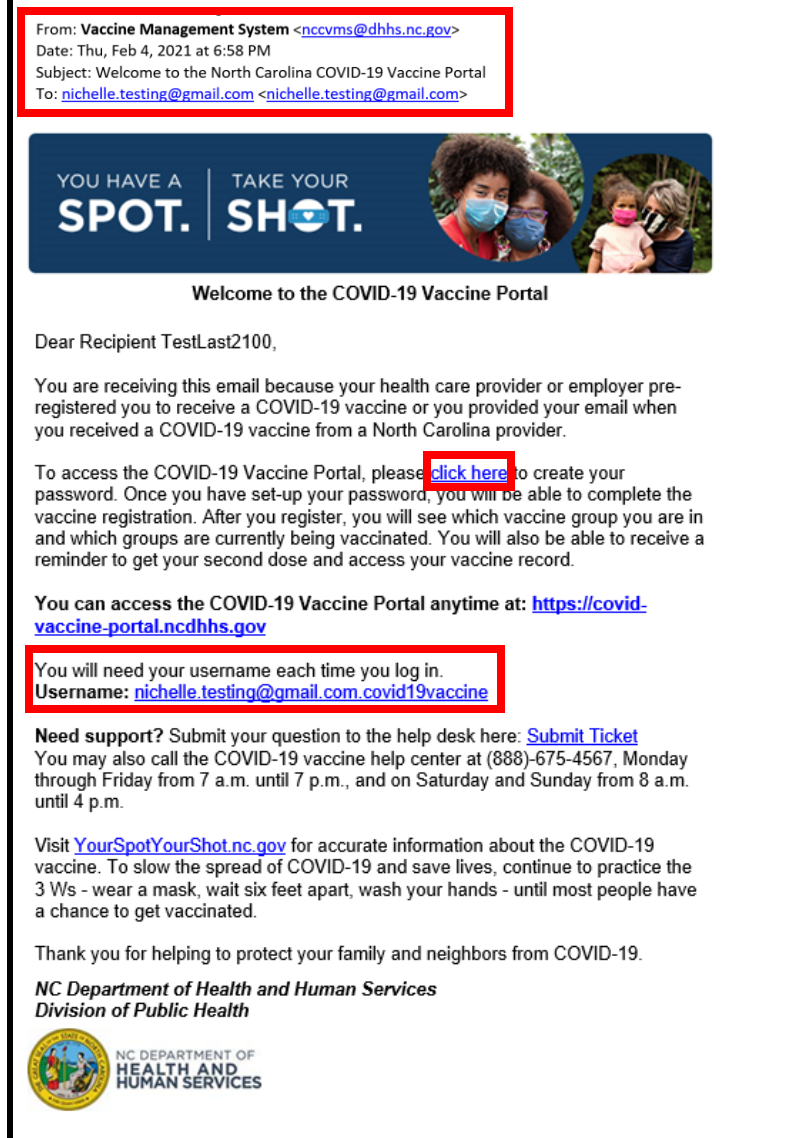
Audience

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Next Actions for Uploaded Recipients

Step 1 of 3: CVMS COVID-19 Portal Email Notification



Once successfully loaded into the CVMS Provider Portal, an **AUTOMATIC EMAIL NOTIFICATION** will be sent to each recipient.

The email will come from:

Vaccine Management System nccvms@dhhs.nc.gov

Email Subject: Welcome to the North Carolina Vaccine Management COVID-19 Vaccine Portal

This **EMAIL CONTAINS A LINK TO SETUP YOUR PASSWORD.** Your **CVMS COVID-19 Vaccine Portal USERNAME** is listed in the email.

1. Click the **LINK** in the email
2. The password setup page appears, follow the instructions to create your password

NOTE: A COVID-19 Vaccine Portal Account is **NOT REQUIRED** to **RECEIVE A COVID-19 VACCINE**. If a recipient does not have a valid email address or does not want to register, they can check their Vaccine Group and schedule an appointment with a vaccine provider. They can go to <https://covid19.ncdhhs.gov/findyourspot> to find participating COVID-19 vaccinating providers.

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Tips

Inform your employees to allow incoming emails from nccvms@dhhs.nc.gov.

Step 2 of 3: CVMS COVID-19 Vaccine Portal Password Reset & Username

By clicking on the link inserted in the email notification will prompt recipients to:

1. Type their **USERNAME**

The COVID-19 Vaccine Portal Username has **.COVID19VACCINE** added to the end of the email address they provided

2. Set their **PASSWORD**, they will then be prompted to the portal home page

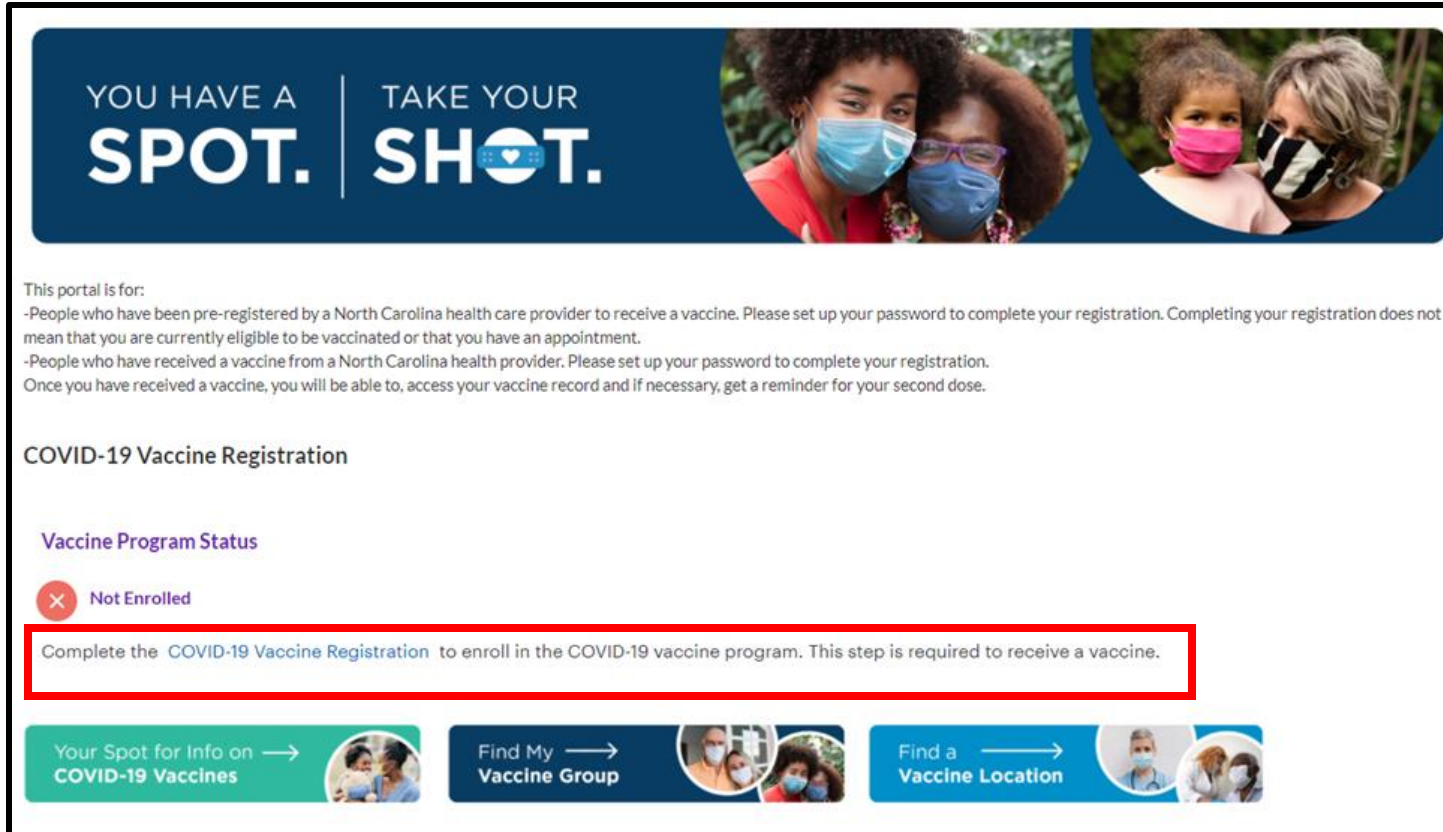
3. Click on **COVID-19 Vaccine Registration**

Audience

Healthcare
Location Manager

Tips

If a recipient forgets their password, they can click on Forgot password. A new email with a link to reset the password will be sent to the email address on file.



YOU HAVE A **SPOT.** | TAKE YOUR **SHOT.**

This portal is for:

- People who have been pre-registered by a North Carolina health care provider to receive a vaccine. Please set up your password to complete your registration. Completing your registration does not mean that you are currently eligible to be vaccinated or that you have an appointment.
- People who have received a vaccine from a North Carolina health provider. Please set up your password to complete your registration. Once you have received a vaccine, you will be able to, access your vaccine record and if necessary, get a reminder for your second dose.

COVID-19 Vaccine Registration

Vaccine Program Status

✕ Not Enrolled

Complete the [COVID-19 Vaccine Registration](#) to enroll in the COVID-19 vaccine program. This step is required to receive a vaccine.

Your Spot for Info on [COVID-19 Vaccines](#) → [Find My Vaccine Group](#) → [Find a Vaccine Location](#)

Step 3 of 3: CVMS COVID-19 Vaccine Portal COVID-19 Vaccination Registration Form

To complete the **COVID-19 VACCINATION REGISTRATION** form, the recipient will enter **DEMOGRAPHIC DETAILS** and their **VACCINE GROUP** as determined by <https://findmygroup.nc.gov>.

*A recipient's **VACCINE GROUP** is determined by the information they enter into the **FIND MY GROUP** tool as determined by the NC Immunization Branch. Vaccine Group requirements may be adjusted in the future by the NC Immunization Branch.*

Audience

Healthcare
Location Manager

Tips

Inform your employees to complete their COVID-19 Vaccination Registration form in the COVID-19 Vaccine Portal, prior to scheduling an appointment to receive their COVID-19 vaccine.

Vaccine Registration for: Jon NewRecipient

Introduction

Contact and Demographic Detail

Confirmation





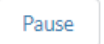
Your registration is complete

Thank you for completing the registration process. Please remember that registration does not mean that you are currently eligible to be vaccinated or that you have an appointment. A free COVID-19 vaccine will be available to all who want it, but supplies are currently limited. Get accurate information about COVID-19 vaccines at <https://covid19.ncdhhs.gov/findyourspot>.

Appendix

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Supported Web Browsers:

- Please use the latest version of Chrome, Edge Chromium, Firefox or Safari browsers to access CVMS.
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.

User Guide Change Log

Key Items:

- **Date of Change:** Date that any updates were made to the User Guide
- **Changes Made:** Summary of the updates made within the User Guide
- **Impacted Slides:** Specific slides that were updated or changed
- **Author:** The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/10/2020	<ul style="list-style-type: none">• Initial document		Azalea Troche
2	12/22/2020	<ul style="list-style-type: none">• Search and sort the Recipient Bulk Upload List• COVID-19 Vaccination (Health) Questionnaire Updates• Updated email notification for the COVID-19 Vaccine Portal	25, 29, 30	Azalea Troche
3	1/8/2021	<ul style="list-style-type: none">• Modify Bulk Upload template• Change instructions for file with more than 100 recipients	11-26	Simon Couderc
4	1/14/2021	<ul style="list-style-type: none">• Removed Any Remaining Mentions Of The CVMS Help Desk Emails.• Updated Recipient Bulk Upload To Include The Low Volume And High-volume Upload Options• Added CVMS Help Desk Team File Upload	31 9, 12-17, 19-21	Courtney Seward Azalea Troche Nicholas Rinz
5	1/27/2021	<ul style="list-style-type: none">• Updated Navigation Bar Screenshots To Show New Reports Tab• Updated COVID-19 Vaccine Portal Screenshots	5,12,13,14,17,18,24, 34,35,36	Kristin Clark
6	3/3/2021	<ul style="list-style-type: none">• Updated Reason for Failure for Bulk Upload• Updated Call Center Information	2,25	Nicholas M. Rinz
7	3/4/2021	<ul style="list-style-type: none">• Updated text to show correct branding	15,19,20,25,32,34,36	Kaitlin Gates
8	6/11/2021	<ul style="list-style-type: none">• Updated common errors – removed e-mail and added special characters error	25	Darrell Lee